Market Forecasts

INPUT

MF- 1

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Forecasts Are for U.S. Non-Captive User Expenditures, in Current Period Dollars.

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MF- 2

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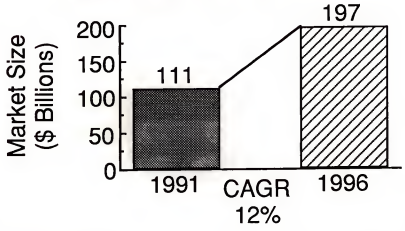
U.S. Information Services Market, 1991-1996



MF-3

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Notes

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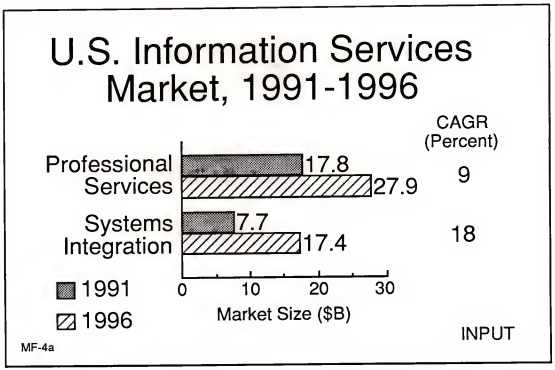

Notes

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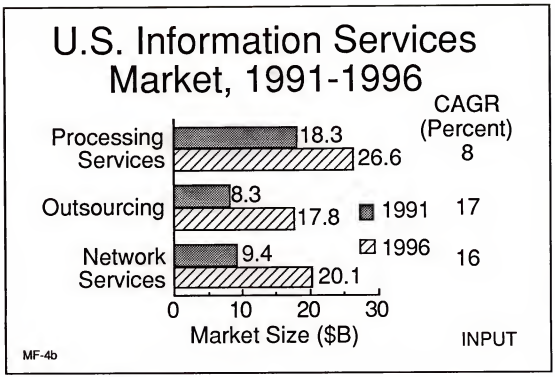

Notes

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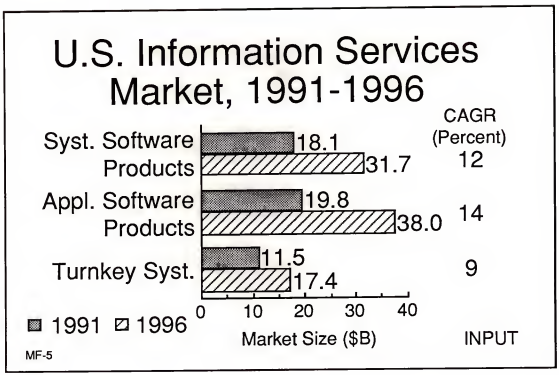

Notes

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Selected Leading Information Services Vendors

Vendor	1990 U.S. Rev. ($B)	Market Share (Percent)
IBM	5.8	6
EDS	2.4	2
ADP	1.7	2

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MF-6a

Notes

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Selected Leading Information Services Vendors

Vendor	1990 U.S. Rev. ($B)	Market Share (Percent)
Computer Sciences	1.5	2
Digital Equipment	1.3	1
Andersen Consulting	1.2	1

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MF-6b

Notes

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Selected Leading Information Services Vendors

Vendor	1990 U.S. Rev. ($B)	Market Share (Percent)
Unisys	0.9	1
Control Data	0.8	1
Computer Assoc.	0.7	1

INPUT

MF-7

Notes

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Impact of Economic Slowdown
(Short-Term)

	Change in Growth Rate
Processing Services	—
Network Services	—
Software Products	↓
Turnkey Systems	↓

INPUT

MF-13

Notes

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Impact of Economic Slowdown
(Short-Term)

	Change in Growth Rate
Professional Services	↓
Systems Integration	↓
Systems Operations	↑

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MF-14

Notes

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Impact of Economic Slowdown—Information Services Vendors

- Some near-term growth impact
- Stay close to clients
- Prospects-know secondary buyer
- Expect the unexpected
- Watch internal budgets

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MF-15

Notes

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Impact of Economic Slowdown—Information Services Vendors

- Some near-term growth impact
- Stay close to clients
- Prospects-know secondary buyer
- Expect the unexpected
- Watch internal budgets

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Notes

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U.S. Information Services Industry

1990 Performance

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Notes

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1990-1995 Forecast Results

U.S. IS Market

	89-90 Growth	Prelim. Results	90-91 Growth	Prelim. Forecast
Applications SW Prod.	12	+	12	+
Systems SW Prod.	13	0	12	+

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Notes

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1990-1995 Forecast Results

U.S. IS Market

	89-90 Growth	Prelim. Results	90-91 Growth	Prelim. Forecast
Professional Services	10	+	10	0
Systems Integration	19	—	18	—

INPUT

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Notes

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1990-1995 Forecast Results

U.S. IS Market

	89-90 Growth	Prelim. Results	90-91 Growth	Prelim. Forecast
Processing Services	8	—	8	—
Systems Operations	16	+	15	+

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Notes

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1990-1995 Forecast Results

U.S. IS Market

	89-90 Growth	Prelim. Results	90-91 Growth	Prelim. Forecast
Turnkey Systems	9	0	9	0
Network Services	16	—	16	—

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Public Information Services Vendors

1990 Performance

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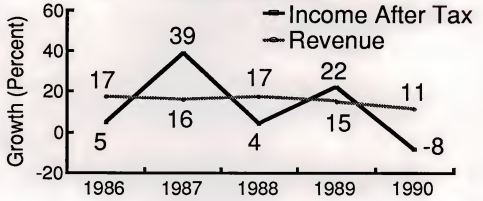
Public Vendors

Processing/Network Services



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Notes

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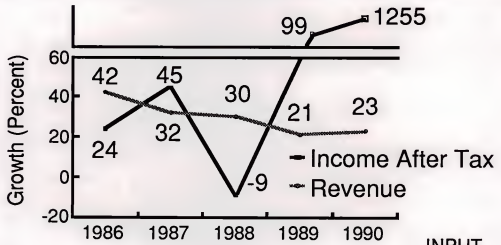
Public Vendors

Electronic Information Services



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Notes

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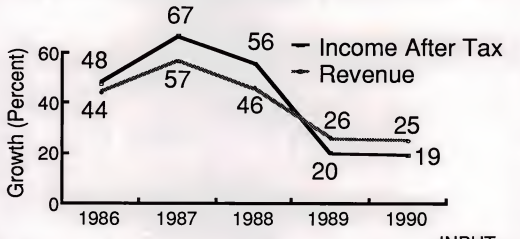
Public Vendors

Systems Software Products



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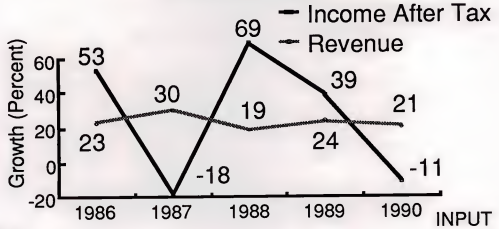
Public Vendors

Applications Software Products



MF-25

Notes

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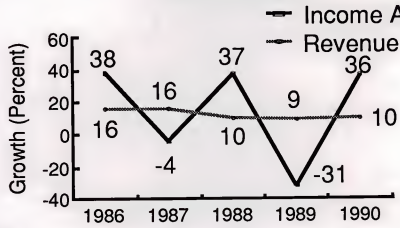
Public Vendors

Government Professional Services



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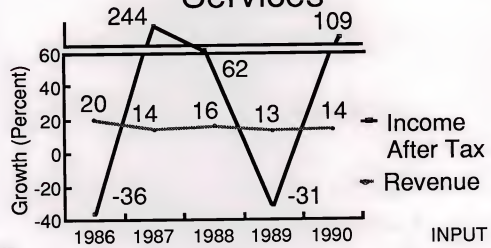
Public Vendors

Commercial Professional Services



MF-27

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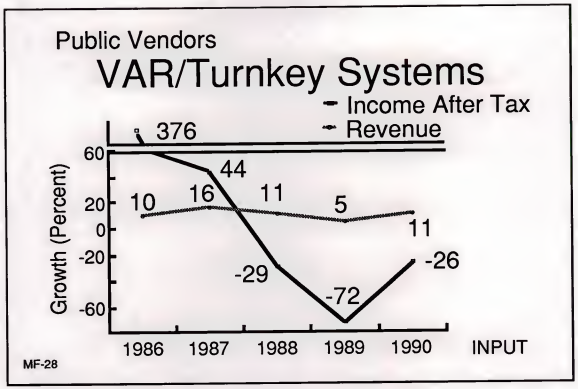

Notes

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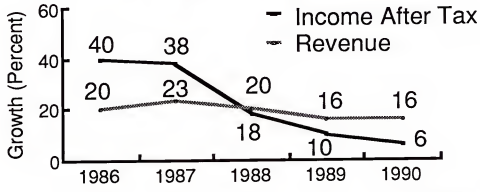
Public Vendors

Information Services Performance



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Notes

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Public Software Companies

	PC (Percent)	Other (Percent)
89-90 Growth		
Revenue	33	18
Net Income	15	(27)
Profit Margin*		
1989	13	10
1990	15	6

*After Tax

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Notes

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Leading SI and Professional Services Vendors

Vendor	1990 U.S. Rev. ($ B)	% Prof. Services	% SI
IBM	1.8	28	72
EDS	1.1	42	58
Andersen Consulting	1.0	31	69

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Notes

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Leading SI and Professional Services Vendors

Vendor	1990 U.S. Rev. ($ B)	% Prof. Services	% SI
CSC	0.9	52	48
DEC	0.7	25	75
Unisys	0.6	32	68

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Notes

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Leading SI and Professional Services Vendors

Vendor	1990 U.S. Rev. ($ B)	% Prof. Services	% SI
SAIC	0.5	11	89
PRC	0.4	47	53
Grumman	0.4	56	44

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Notes

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Leading Processing Services and SO Vendors

Vendor	1990 U.S. Rev. ($ B)	% Proc. Services	% SO
ADP	1.24	99	1
EDS	1.18	15	85
FFMC	0.84	88	12
Am. Express	0.73	100	—

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Notes

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Leading Processing Services and SO Vendors

Vendor	1990 U.S. Rev. ($ B)	% Proc. Services	% SO
CSC	0.53	13	87
CDC	0.32	97	3
IBM	0.27	37	63
Covia	0.24	100	—

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Notes

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Leading Processing Services and SO Vendors

Vendor	1990 U.S. Rev. ($ B)	% Proc. Services	% SO
NDC	0.23	100	—
Systematics	0.19	—	100
GTECH	0.18	100	—
GEIS	0.18	100	—

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Notes

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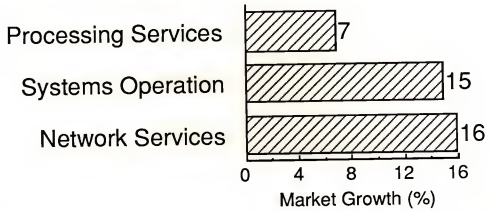
U.S. Information Services Market, 1990-1991



MF-37a

Notes

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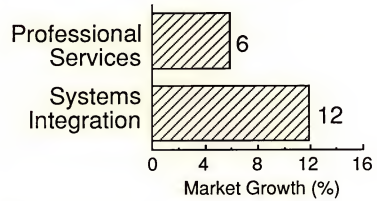
U.S. Information Services Market, 1990-1991



INPUT

MF-37b

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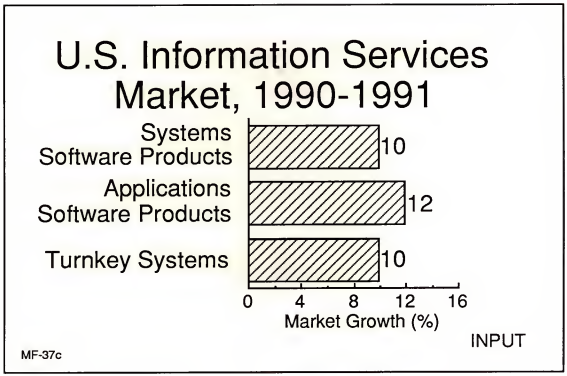

Notes

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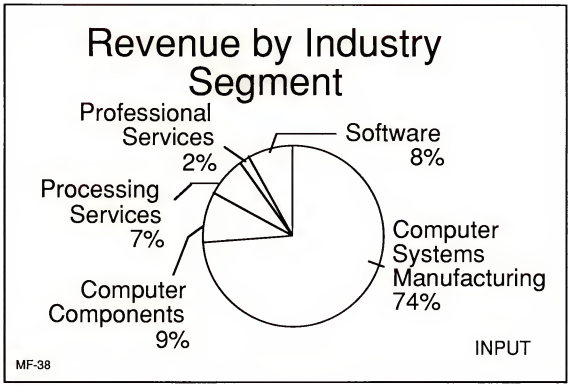

Notes

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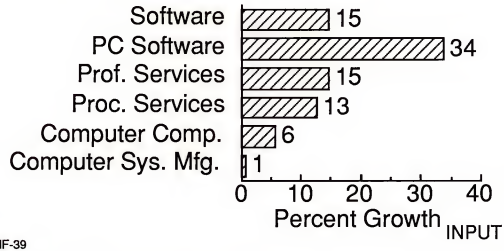
Industry Segment Revenue Growth



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Notes

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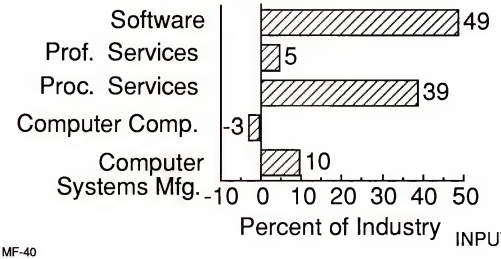
Earnings by Industry Segment



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Notes

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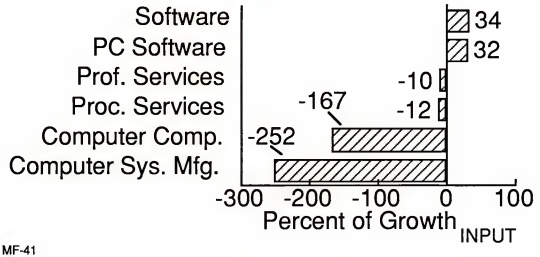
Earnings Growth by Industry Segment



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Notes

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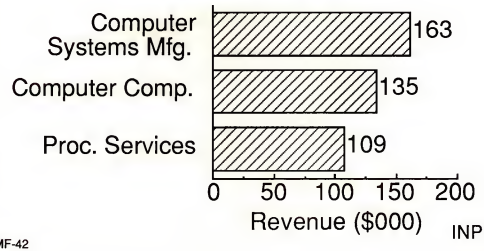
Revenue per Employee by Industry Segment



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Notes

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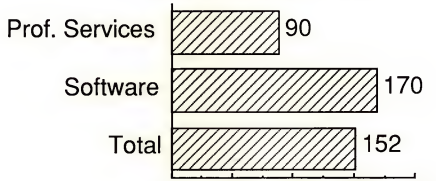
Revenue per Employee by Industry Segment



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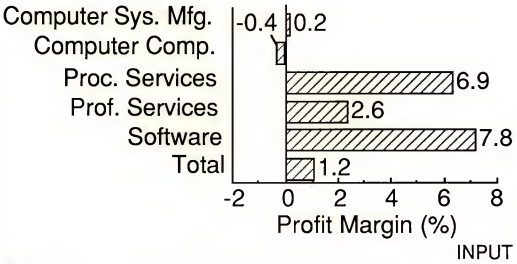
Profitability by Ind. Segment



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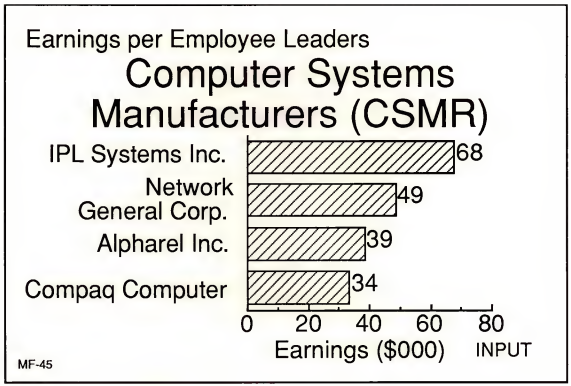

Notes

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Earnings per Employee Leaders

Computer Systems Manufacturers (CSMR)

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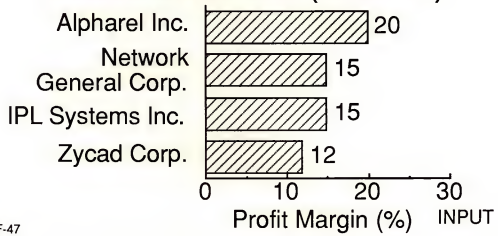
Profit Margin Leaders

Computer Systems Manufacturers (CSMR)



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Notes

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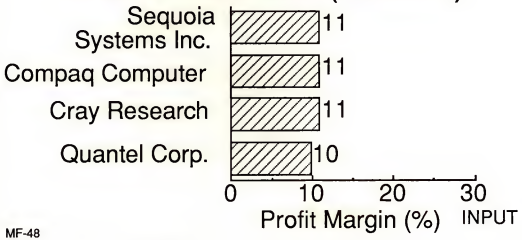
Profit Margin Leaders

Computer Systems Manufacturers (CSMR)



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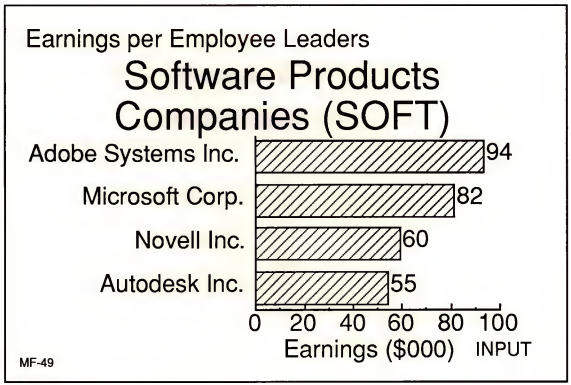

Notes

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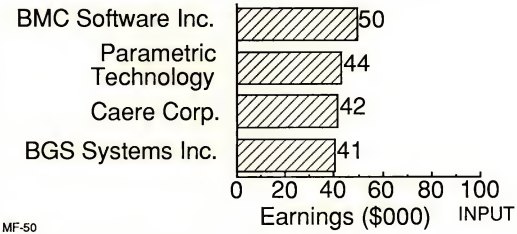
Earnings per Employee Leaders

Software Products Companies (SOFT)



MF-50

Notes

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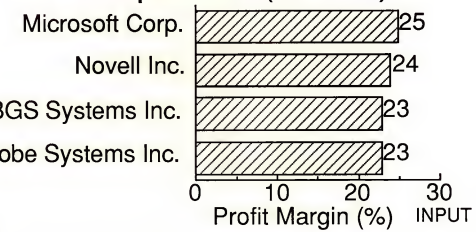
Profit Margin Leaders

Software Products Companies (SOFT)



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Notes

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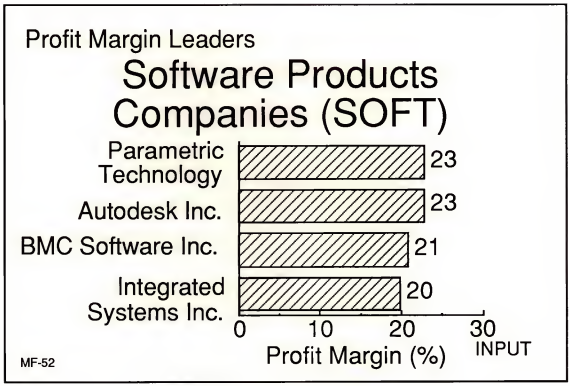

Notes

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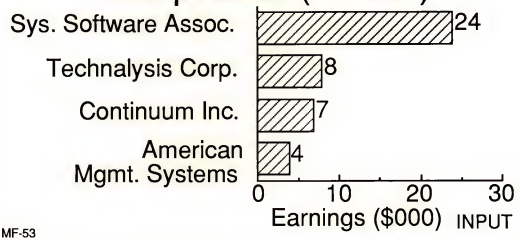
Earnings per Employee Leaders

Professional Services Companies (PROF)



MF-53

Notes

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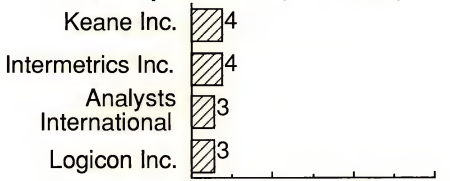
Earnings per Employee Leaders

Professional Services Companies (PROF)



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Notes

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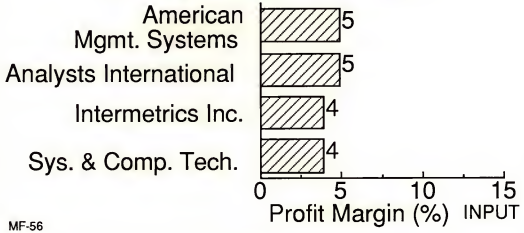
Profit Margin Leaders

Professional Services Companies (PROF)



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Notes

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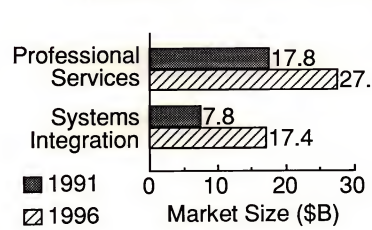
U.S. Information Services Market, 1991-1996



MF-4a

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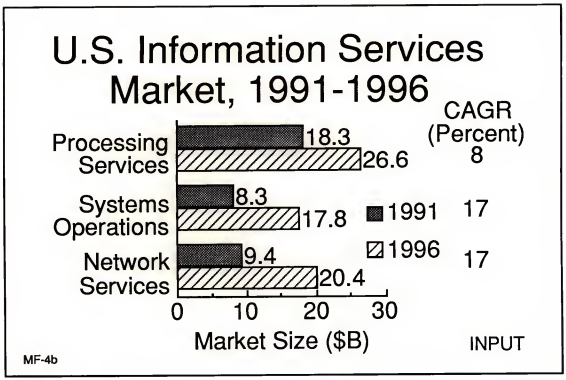

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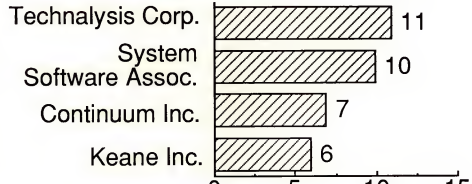
Profit Margin Leaders

Professional Services Companies (PROF)



MF-55

Notes

4/14/92

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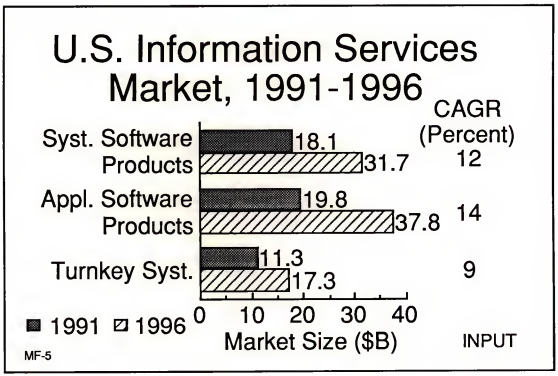

Notes

10/29/91

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